
Unit B

Word and Information Management

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Records Management **Learning Plan**

Why This Skill Is Important

Records are vital for the efficient operation of any business. Records are used for making decisions, tracking progress, and communicating with internal and external customers. In this learning plan you will identify how to store records so they are secure and accessible when needed by authorized users. This learning plan addresses three competencies.

Related Wisconsin Model Academic Standards for Business

A.12.10, A.12.12, A.BS.7, B.12.21, B.BS.14, B.BS.17

Competency 1

Store automated or manual records

Linked Core Abilities

- A. Demonstrate basic academic skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ records are kept in a safe, secure environment
- ☐ storage method permits easy storage and retrieval
- ☐ records are accessible on demand to designated users
- ☐ records are updated as needed according to established company procedures

Conditions—How you will be evaluated:

- ☐ in the workplace
- ☐ provided with records

Competency 2

File documents

Linked Core Abilities

- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ documents are accurately indexed according to established procedures
- ☐ documents are accurately sorted and filed, according to established procedures
- ☐ documents are cross-referenced as needed
- ☐ documents are inspected for completeness according to company policy
- ☐ documents are accessible on demand

Conditions—How you will be evaluated:

- ☐ in the workplace
- ☐ provided documents

Competency 3

Retrieve filed documents and integrated media

Linked Core Abilities

- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ documents are retrieved by authorized personnel within prescribed retrieval time
- ☐ documents are accessed following established procedures
- ☐ correct documents are retrieved
- ☐ document distribution is recorded, as required

Conditions—How you will be evaluated:

- ☐ in the workplace
- ☐ with request for specific documents/media



Learning Activities

- _____ 1. Identify types of records used at work site.
- _____ 2. Classify records used at work site.
- _____ 3. Participate in discussion of how an efficient records management system is organized.
- _____ 4. Diagram the phases of a record life cycle.
- _____ 5. Create a form to be used to maintain data for work site.
- _____ 6. Compare methods of storing manual and automated records.
- _____ 7. Review a records retention schedule guide.
- _____ 8. Prepare a checklist to identify a secure system.
- _____ 9. Develop an audit checklist for a work site.
- _____ 10. Prepare written proposal to improve records management at work site.
- _____ 11. Summarize what was learned during tour of a records department.
- _____ 12. Summarize an interview with a record manager.
- _____ 13. Prepare outline of how personal records will be managed.
- _____ 14. Research the career opportunities in record management.



Why This Skill Is Important

Do you need ten copies of an agenda in five minutes? Everyone in an office needs to photocopy documents in a speedy, efficient, and cost-effective manner. Your photocopied documents should be reader friendly. Learning the basics of photocopying will save you time.

Related Wisconsin Model Academic Standards for Business

A.12.16, A.12.20, B.12.16-17, B.BS.2, B.BS.6, B.BS.12, and B.BS.14

Competency

Photocopy documents

Linked Core Abilities

- A. Demonstrate basic academic skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you use features on photocopier to produce single-sided documents
- ☐ you use features on photocopier to produce two-sided documents
- ☐ you collate and staple multi-page documents
- ☐ photocopied document is properly placed on the page
- ☐ photocopied document is of mailable quality (neither too light nor too dark)

Conditions—How you will be evaluated:

- ☐ in the workplace
- ☐ with a need for copies of documents

Learning Activities

- _____ 1. Visit our A.V. Department to see the machines that are available on site.
- _____ 2. Examine several different qualities and kinds of paper.
- _____ 3. Complete a scavenger hunt for machine parts from the user's manual.



- _____ 4. Collect several examples of materials to be copied and determine the most efficient and most cost effective copier to use.
- _____ 5. Calculate the cost per page for copying various types of documents based on machine and supplies used.
- _____ 6. Run copies on different machines and different papers; compare the quality of each.
- _____ 7. Evaluate a document for basic desktop design elements.
- _____ 8. Practice enlarging and decreasing the size of an original document.
- _____ 9. Demonstrate ability to collate multi-page documents.
- _____ 10. Tour a reprographics business in the community.
- _____ 11. Discuss careers in the reprographics industry.

Specialized Documents Learning Plan

Why This Skill Is Important

As an employee, you may be asked to create a variety of specialized documents as well as work as a part of a team. During this learning unit you will create documents for specific purposes. This learning plan addresses four competencies.

Related Wisconsin Model Academic Standards for Business

A.12.1, A.12.10, B.12.2, B.12.10, B.12.19, B.BS.16, J.12.1, J.12.3, J.12.7

Competency 1

Create specialized documents including components such as tables, graphs, and multi-column documents

Linked Core Abilities

- A. Demonstrate basic academic skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you apply mailability standards to the documents
- ☐ tables in documents are centered within text
- ☐ tables include aligned columns
- ☐ tables and graphs include headings
- ☐ graphs (bar, line, pie, etc.) are selected for data following guidelines of the organization
- ☐ graphs include labeling, key, and/or legend
- ☐ charts, tables, and graphs include footnotes when necessary

Conditions—How you will be evaluated:

- ☐ in the workplace or simulated situation
- ☐ provided information to compile

Competency 2

Import text and graphics from other software programs

Linked Core Abilities

- A. Demonstrate basic academic skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you use disks or scanner and/or CD-ROM to obtain graphics or text
- ☐ you crop and/or resize graphics as necessary
- ☐ you use copy, cut and/or paste commands of software package
- ☐ you integrate graphics from other software packages when appropriate

Conditions—How you will be evaluated:

- ☐ in the workplace or simulated situation
- ☐ given specific purpose/reason to import text

Competency 3

Create documents by merging information

Linked Core Abilities

- A. Demonstrate basic academic skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you integrate information from database and/or spreadsheet into word processing document
- ☐ you integrate chart and/or table into word processing document
- ☐ you create form letters to be used with a database

Conditions—How you will be evaluated:

- ☐ in the workplace or simulated situation
- ☐ given reason to generate merged document
- ☐ using existing database and/or spreadsheet

Competency 4

Print documents or specific pages

Linked Core Abilities

- A. Demonstrate basic academic skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you select appropriate printer for the computer
- ☐ you accurately print specific pages of a multi-page document

Conditions—How you will be evaluated:

- ☐ in the workplace or simulated situation
- ☐ given instructions to print specific pages/documents

Learning Activities

- _____ 1. Discuss individual roles when working as part of a team.
- _____ 2. Review headers, enumerations, alignments, hanging indents, etc.
- _____ 3. Review proofreading skills.
- _____ 4. Practice transferring text by downloading it to a disk.
- _____ 5. Practice receiving text by downloading it from a disk to your document.
- _____ 6. Practice transferring text by sending it as an attachment to e-mail.
- _____ 7. Practice receiving text sent as an attachment and downloading to your document.
- _____ 8. Generate specific pages of a multi-page document for use by you and your team members.
- _____ 9. Apply correct formatting.
- _____ 10. Apply proofreading skills to your pages as well as your team member's pages.
- _____ 11. Transfer specified pages to team members as an e-mail attachment.
- _____ 12. Transfer specified pages to a disk for use by team members.

- _____ 13. Download e-mail attachment received from team members and add it to your document.
- _____ 14. Download pages received on a disk from team members and add it to your document.
- _____ 15. Edit and print reference booklet.
- _____ 16. Evaluate the contribution of each team member.

Business Forms Learning Plan

Why This Skill Is Important

Creating business forms appropriate for a task is a real skill. The objective of this unit is to help you obtain adequate information to generate a variety of business forms.

Related Wisconsin Model Academic Standards for Business

A.BS.2-5, B.BS.2, B.BS.5, B.BS.7, B.BS.11, B.BS.12, B.BS.14, B.12.10, B.12.13, J.12.1, J.12.3, J.12.5

Competency

Generate business forms

Linked Core Abilities

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you use word processing, desktop publishing, or form-generating software package to create form
- ☐ form contains complete information
- ☐ form contains accurate information
- ☐ form meets mailability standards
- ☐ form contains a title
- ☐ form utilizes boxes and lines appropriately
- ☐ form meets layout specifications required by the organization

Conditions—How you will be evaluated:

- ☐ in the workplace or simulated situation
- ☐ given specific reason to generate form

Learning Activities

- _____ 1. Compare five business forms from local businesses and/or workstations.
- _____ 2. Compare five forms from Internet sources.
- _____ 3. Analyze forms to determine if layout specifications required are met.
- _____ 4. Create a form, with instructor criteria, using word processing, desktop publishing, or form-generating software packages.
- _____ 5. Review form created with a partner for completeness, accuracy, mailability, title, utilization of boxes and line and layout specifications.
- _____ 6. Create final form, with instructor criteria, importing text and/or graphics using Internet and other software program.

Why This Skill Is Important

An integral component of a student's educational experience should be active participation in a professional student organization (Future Business Leaders of America-FBLA). These learning activities provide a way to integrate FBLA into your co-op classroom to strengthen FBLA leadership skills.

Related Wisconsin Model Academic Standards for Business

A.12.17, A.BS.5, B.12.5, B.12.10, B.12.13, B.BS.6, B.BS.7, B.BS.15, F.BS.1, H.12.3, J.BS.2

Competency

Generate newsletters, brochures, programs, or invitations

Linked Core Abilities

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you use desktop publishing software to produce the specialized document
- ☐ publication meets layout specifications required by the organization
- ☐ you use desktop publishing software to produce a bi-fold or tri-fold publication
- ☐ publication meets mailability standards
- ☐ publication includes text and graphics
- ☐ publication includes multiple fonts and/or styles
- ☐ publication contains complete information
- ☐ publication contains accurate information

Conditions—How you will be evaluated:

- ☐ in the workplace
- ☐ as requested or needed by the organization
- ☐ using information from the publisher

Learning Activities

- _____ 1. Complete a crossword puzzle using FBLA-PBL knowledge.
- _____ 2. Develop keyboarding skill by keying timed writings with focus on FBLA activities.
- _____ 3. Research and key report using information on the history of FBLA.
- _____ 4. Develop a news release on results of FBLA Leadership Conferences.
- _____ 5. Prepare business letters on various FBLA subjects such as recruitment and activities.
- _____ 6. Discuss case studies involving business situations with FBLA integrated in the situation.
- _____ 7. Create brochures for recruitment and activities using desktop publishing applications.
- _____ 8. Make a Power Point presentation on the activities of school's FBLA chapter.
- _____ 9. Present an oral report to classes using the Power Point presentation on school's FBLA chapter.
- _____ 10. Discuss FBLA chapter's future activities with fellow students.

Why This Skill Is Important

In this unit you will search various resources for job openings related to your career interest. You will use the internet, newspapers, employment agencies, and networking options that are available while conducting a job search. You will also learn about terminology used in employment advertisements.

Related Wisconsin Model Academic Standards for Business

K.12.15, B.12.1, B.12.5, B.12.10, B.12.18-20

Competency 1

Use a variety of resources to obtain information

Linked Core Abilities

- A. Demonstrate basic academic skills
- C. Apply critical thinking and information processing skills
- E. Work with a variety of technologies

Performance Standards

Criteria—When your performance will be acceptable:

- ☐ you use appropriate techniques to locate information for a specific purpose
- ☐ you evaluate appropriateness of information
- ☐ you evaluate relevancy of materials
- ☐ you determine validity of information
- ☐ you evaluate credibility of source
- ☐ you synthesize information from resources to complete a specific task

Conditions—How you will be evaluated:

- ☐ in the workplace
- ☐ as requested or needed

Competency 2

Produce formatted business letters, memorandums, and reports

Performance Standards

Criteria—When your performance will be acceptable:

- “ documents are word processed
- “ documents contain complete information
- “ documents contain accurate information
- “ you apply mailability standards to all documents
- “ letters are formatted as block, modified block, or simplified style
- “ reports are formatted in an acceptable style as required by the organization
- “ memos are formatted in a style required by the organization
- “ reports include appropriate cover/title page and numbered pages

Conditions—How you will be evaluated:

- “ in the workplace or simulated situation
- “ with a need to communicate information, correspondence, data, etc.

Linked Core Abilities

- A. Demonstrate basic academic skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

Learning Activities

- _____ 1. Create a list of job contacts through networking with family and friends.
- _____ 2. Compile a list of job openings from print media.
- _____ 3. Compile a list of job openings from an Internet search.
- _____ 4. Contact public/private employment agencies.
- _____ 5. Define terminology utilized in employment advertisements.
- _____ 6. Compare various types of employment advertisements (open, blind, spot, etc.).
- _____ 7. Evaluate a job shadow experience.
- _____ 8. Develop a request letter for items needed to apply (job application form, references, etc.).
- _____ 9. Merge a cover letter with job lead databases.

Store Records Checklist

Competency

Store automated or manual records

Linked Core Abilities

Demonstrate basic academic skills

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

Work with a variety of technologies

Directions

After you have an opportunity to practice storing automated or manual records, you will be asked to demonstrate your newly acquired skill in the workplace. Your competence will be assessed by your supervisor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked “yes,” unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 records are kept in a safe, secure environment	yes no not observed	
2 storage method permits easy storage and retrieval	yes no not observed	
3 records are accessible on demand to designated users	yes no not observed	
4 records are updated as needed according to established company procedures	yes no not observed	
5 you recognize how technological systems work (Core Ability)	yes no not observed	
6 you recognize problems and problem situations (Core Ability)	yes no not observed	



File Documents Checklist

Competency

File documents

Linked Core Abilities

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

Directions

After you have an opportunity to practice filing documents, you will be asked to demonstrate your newly acquired skill in the workplace. Your competence will be assessed by your supervisor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 documents are accurately indexed according to established procedures	yes no not observed	
2 documents are accurately sorted and filed, according to established procedures	yes no not observed	
3 documents are cross-referenced as needed	yes no not observed	
4 documents are inspected for completeness according to company policy	yes no not observed	
5 documents are accessible on demand	yes no not observed	
6 you recognize problems and problem situations (Core Ability)	yes no not observed	



Retrieve Filed Documents Checklist

Competency

Retrieve filed documents and integrated media

Linked Core Abilities

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

Directions

After you have an opportunity to practice retrieving filed documents and integrated media, you will be asked to demonstrate your newly acquired skill in the workplace. Your competence will be assessed by your supervisor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 documents are retrieved by authorized personnel within prescribed retrieval time	yes no not observed	
2 documents are accessed following established procedures	yes no not observed	
3 correct documents are retrieved	yes no not observed	
4 document distribution is recorded, as required	yes no not observed	
5 you recognize how technological systems work (Core Ability)	yes no not observed	



Photocopy Documents Checklist

Competency

Photocopy documents

Linked Core Abilities

Demonstrate basic academic skills

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

Work with a variety of technologies

Directions

After you have an opportunity to practice using a photocopier to duplicate documents, you will be asked to demonstrate your newly acquired skill in the workplace. Your competence will be assessed by your supervisor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 you use features on photocopier to produce single-sided documents	yes no not observed	
2 you use features on photocopier to produce two-sided documents	yes no not observed	
3 you collate and staple multi-page documents	yes no not observed	
4 photocopied document is properly placed on the page	yes no not observed	
5 photocopied document is of mailable quality (neither too light nor too dark)	yes no not observed	
6 you use the proper procedures when working with the photocopier (Core Ability)	yes no not observed	
7 you solve minor equipment-related problems (Core Ability)	yes no not observed	



Input Documents Checklist

Competency

Input documents

Linked Core Abilities

Demonstrate basic academic skills

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

Work with a variety of technologies

Directions

After you have an opportunity to practice using various methods to input documents, you will be asked to demonstrate your newly acquired skill in the workplace. Your competence will be assessed by your supervisor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked “yes,” unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 you select most efficient method to input data for the task	yes no not observed	
2 you select appropriate equipment for the task (Core Ability)	yes no not observed	
3 documents are word processed or typed, scanned, or inputted by voice	yes no not observed	
4 you effectively communicate information using a computer (Core Ability)	yes no not observed	
5 documents are formatted in an acceptable style, according to company's guidelines	yes no not observed	
6 you proofread documents	yes no not observed	
7 you correct errors in documents	yes no not observed	
8 you recognize problems and problem situations (Core Ability)	yes no not observed	



Format Documents Checklist

Competency

Produce formatted business letters, memorandums, and reports

Linked Core Abilities

Demonstrate basic academic skills

Apply critical thinking and information processing skills

Work with a variety of technologies

Directions

After you have an opportunity to practice formatting a variety of documents and reports, you will be asked to demonstrate your newly acquired skill in the workplace or in response to a simulated situation. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 documents are word processed	yes no not observed	
2 you communicate information using a computer (Core Ability)	yes no not observed	
3 documents contain complete information	yes no not observed	
4 documents contain accurate information	yes no not observed	
5 you apply mailability standards to all documents	yes no not observed	
6 letters are formatted as block, modified block, or simplified style	yes no not observed	
7 reports are formatted in an acceptable style as required by the organization	yes no not observed	
8 you organize information (Core Ability)	yes no not observed	
9 memos are formatted in a style required by the organization	yes no not observed	
10 reports include appropriate cover/title page and numbered pages	yes no not observed	



Specialized Documents Checklist

Competency

Create specialized documents including components such as tables, graphs, and multi-column documents

Linked Core Abilities

Demonstrate basic academic skills

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

Work with a variety of technologies

Directions

After you have an opportunity to practice creating specialized documents you will be asked to demonstrate your newly acquired skill in the workplace and/or in response to a simulated situation. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 you apply mailability standards to the documents	yes no not observed	
2 tables in documents are centered within text	yes no not observed	
3 you organize information in documents (Core Ability)	yes no not observed	
4 tables include aligned columns	yes no not observed	
5 tables and graphs include headings	yes no not observed	
6 graphs (bar, line, pie, etc.) are selected for data following guidelines of the organization	yes no not observed	
7 graphs include labeling, key, and/or legend	yes no not observed	
8 charts, tables, and graphs include footnotes when necessary	yes no not observed	
9 you interpret information included in the document (Core Ability)	yes no not observed	



Import Text/Graphics Checklist

Competency

Import text and graphics from other software programs

Linked Core Abilities

Demonstrate basic academic skills

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

Work with a variety of technologies

Directions

After you have practiced importing text and graphics from other software programs, you will be asked to demonstrate your newly acquired skill in the workplace and/or in response to a simulated situation. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 you select appropriate equipment for a task (Core Ability)	yes no not observed	
2 you use disks or scanner and/or CD-ROM to obtain graphics or text	yes no not observed	
3 you crop and/or resize graphics as necessary	yes no not observed	
4 you use copy, cut and/or paste commands of software package	yes no not observed	
5 you integrate graphics from other software packages when appropriate	yes no not observed	



Business Forms Checklist

Competency

Generate business forms

Linked Core Abilities

Demonstrate basic academic skills

Use effective personal and interpersonal skills

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

Work with a variety of technologies

Directions

After you have practiced generating various business forms, you will be asked to demonstrate your newly acquired skill in the workplace and/or in response to a simulated situation. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 you use word processing, desktop publishing, or form-generating software package to create form	yes no not observed	
2 you communicate information using a computer (Core Ability)	yes no not observed	
3 form contains complete information	yes no not observed	
4 form contains accurate information	yes no not observed	
5 form meets mailability standards	yes no not observed	
6 form contains a title	yes no not observed	
7 form utilizes boxes and lines appropriately	yes no not observed	
8 form meets layout specifications required by the organization	yes no not observed	
9 you meet expectations of the organization (Core Ability)	yes no not observed	



Merge Documents Checklist

Competency

Create documents by merging information

Linked Core Abilities

Demonstrate basic academic skills

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

Work with a variety of technologies

Directions

After you have practiced creating documents by merging information, you will be asked to demonstrate your newly acquired skill in the workplace and/or in response to a simulated situation. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 you communicate information using a computer (Core Ability)	yes no not observed	
2 you integrate information from database and/or spreadsheet into word processing document	yes no not observed	
3 you integrate chart and/or table into word processing document	yes no not observed	
4 you create form letters to be used with a database	yes no not observed	



Print Documents Checklist

Competency

Print documents or specific pages

Linked Core Abilities

Demonstrate basic academic skills

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

Work with a variety of technologies

Directions

After you have practiced printing documents and specific pages, you will be asked to demonstrate your newly acquired skill in the workplace and/or in response to a simulated situation. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 you select appropriate printer for the computer	yes no not observed	
2 you follow equipment guidelines when using the printer (Core Ability)	yes no not observed	
3 you accurately print specific pages of a multi-page document	yes no not observed	
4 you operate a variety of printers (Core Ability)	yes no not observed	



Newsletters, Brochures, Programs, Invitations Checklist

Competency

Generate newsletters, brochures, programs, or invitations

Linked Core Abilities

Demonstrate basic academic skills

Use effective personal and interpersonal skills

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

Work with a variety of technologies

Directions

After you have practiced generating various special documents—newsletters, brochures, invitations—you will be asked to demonstrate your newly acquired skills in the workplace. Your competence will be assessed by your supervisor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked “yes,” unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 you use desktop publishing software to produce the specialized document	yes no not observed	
2 publication meets layout specifications required by the organization	yes no not observed	
3 you use desktop publishing software to produce a bi-fold or tri-fold publication	yes no not observed	
4 publication meets mailability standards	yes no not observed	
5 publication includes text and graphics	yes no not observed	
6 publication includes multiple fonts and/or styles	yes no not observed	
7 publication contains complete information	yes no not observed	
8 publication contains accurate information	yes no not observed	
9 you generate new and/or creative ideas (Core Ability)	yes no not observed	



Obtain Information Checklist

Competency

Use a variety of resources to obtain information

Linked Core Abilities

Demonstrate basic academic skills

Apply critical thinking and information processing skills

Work with a variety of technologies

Directions

After you have researched the various sources for obtaining business-related information, you may be asked to locate information for a specific purpose for use in the organization where you are working. Your competence will be assessed by your supervisor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 you locate and interpret written information in documents (Core Ability)	yes no not observed	
2 you use appropriate techniques to locate information for a specific purpose	yes no not observed	
3 you evaluate appropriateness of information	yes no not observed	
4 you evaluate relevancy of materials	yes no not observed	
5 you determine validity of information	yes no not observed	
6 you evaluate credibility of source	yes no not observed	
7 you synthesize information from resources to complete a specific task	yes no not observed	



Export Files Checklist

Competency

Export files

Linked Core Abilities

Apply critical thinking and information processing skills

Work with a variety of technologies

Directions

After you have practiced exporting files using several different methods, you will be asked to demonstrate your newly acquired skill in the workplace and/or in a simulated situation. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

Scoring Guide

Criteria	Rating	Comments
1 you save files to a disk	yes no not observed	
2 you save files to a hard drive	yes no not observed	
3 you attach file to an e-mail	yes no not observed	
4 you move file to another existing file	yes no not observed	
5 you select appropriate equipment and resources for a task (Core Ability)	yes no not observed	
6 you use the proper procedures when working with a technology (Core Ability)	yes no not observed	

